

FORESTRY SCIENCE IN THE SERVICE OF MAN



FOREST RECREATION

Market Research-- For Better Outdoor Recreation Opportunities

NUMBER 10

It has been called many things -- "one of America's great new markets," "a quiet revolution," "the second fastest growing outdoor activity in the country," and "the Xerox of the 70's."

What is it? It's camping!

No recreation boom in history compares with the current camping boom. While Americans camped out on at least 60 million occasions in 1960, by 1969 the number of camping occasions had more than doubled. Sales of recreational vehicles -- trailers, pick-up campers, vans, and tent-trailers -- jumped from just over 50,000 in 1960 to almost one-half million in 1969. According to the Bureau of Outdoor Recreation, camping will grow by 238 per cent between now and



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and the year 2,000.

Such fast growth means accompanying problems -- a lack of parking spaces, regional shortages of campgrounds, and existing campgrounds that are often not designed, equipped, or managed to meet the specialized needs of today's campers.

Since 1964 researchers with the U.S.D.A. Forest Service's Northeastern Forest Experiment Station have been studying these campground problems. For example, they have been investigating the commercial possibilities for developing campgrounds profitably on this country's almost unlimited acreage of privately-owned forest lands. There are now an estimated 10,000 campgrounds in America which are commercially owned and operated. Seven hundred of these are managed under the more than 30 different franchise chains of campgrounds that have spread across the country.

Despite the demand for camping space, campground developers face an imposing list of financial problems -- a generally short camping season, low camping fees, the need for liability insurance, and rising construction costs. In addition, campers increasingly place demands for campsites which are equipped with connections for electricity, water, and sewage disposal, and they often expect a wide variety of recreational facilities in the campground. Developers, therefore, must often spend upwards of \$1,000 per campsite. Multiplied by the 50-100 campsites in the average campground, we're speaking of a \$50,000 to \$100,000 initial investment.

In order to help reduce some of the financial risk to this campground development, Forest Service social scientists have taken consumer research methods to the woods. There they have been studying the camper -- his needs, his camping participation patterns, his reactions to different levels of camping fees, and his "consumer satisfaction" with today's campgrounds.

One of the most recent studies traced the camping activities of a group of more than 500 campers during a four-year period. Surprisingly, the scientists found that twice as many campers were camping less each year than were those who were increasing their campground visits. While many reasons for this trend were studied, it seems likely that campground crowding might play a determining role in how often campers camp. Campers who preferred to visit state and federal campgrounds, and to visit new ones on each trip, were also much more likely to be in the declining camper group than were those who concentrated all of their camping at two or three selected campgrounds, and preferred the commercial developments.

"Brand loyalty," that hidden persuader that keeps a person driving one make of car, drinking one brand of coffee, and smoking one kind of cigarette, also affected camping behavior.

Like the traveler who will only stop at a Howard Johnson restaurant, there are campers who stop only at state parks, or national parks, or commercial or franchised campgrounds. And, by being more selective campers, they are also more likely to be infrequent campers. There are just fewer spots to suit their fancy than are available to the omnivorous campers who will camp anywhere, anytime. The results of one Forest Service study showed that these "brand loyal" campers will only camp, on the average, for about one-half as many days each year as will their more adventuresome counterparts.

Another Forest Service study measured camper reactions to camping fees and how fees influence the camper's decisions of when, where, and how much to camp.

Still another study identified those campers who do the majority of all reported camping each year. One half of the campers are actually responsible for 75 to 90 per cent of all the camping that is done. This "heavy half" of the camping market has been found to occur in other areas of consumer expenditures such as liquor, meats, soaps, and various other household commodities. Campers in the heavy half of the camping market are also increasing their annual camping participation. They have much larger investments in camping equipment, and their annual camping expenditures are three times that of campers in the market's light half.

Forest Service research in outdoor recreation has been going on for more than ten years. Most of this research is intended to provide park managers with an improved understanding of their markets so that our forest resources can be realistically planned and managed to meet all of your outdoor recreation needs.

Every year Forest Service social researchers visit different parks and recreation areas to interview visitors and to update their information. If you are a camper -- or, for that matter, a hunter, fisherman, hiker, or skier -- chances are that sooner or later, one of our uniformed Forest Service interviewers will call on you. And, if you are like 99 per cent of the thousands of park visitors already interviewed, you will probably be glad to have a chance to express your opinions about park management.

The Northeastern Forest Experiment Station has two research projects devoting full time to the study of outdoor recreation problems. For further information about this work you can contact either Wilbur F. LaPage at Durham, N.H., or Elwood Shafer at the New York State College of Forestry at Syracuse, N.Y. The research at Durham is concentrated on camping markets; that at Syracuse deals mainly with measuring outdoor recreation demand.

SOME RECENT PUBLICATIONS AND PUBLISHED ARTICLES ABOUT CAMPING
MARKETS BY NORTHEASTERN FOREST EXPERIMENT STATION RESEARCHERS:

LaPage, W. F.

1966. CAMPGROUNDS STUDIED AS A GUIDE TO RECREATION PLANNERS.
USDA Forest Service Research Note NE-43.

Results of a survey of 108 private campground owners identifying several factors associated with the successful operation of commercial campgrounds.

LaPage, W. F.

1967. SUCCESSFUL PRIVATE CAMPGROUNDS.
USDA Forest Service Research Paper NE-58.

Reports the findings from a survey of over 1,000 visitors to commercial campgrounds in New Hampshire.

LaPage, W. F.

1967. CAMPER CHARACTERISTICS DIFFER AT PUBLIC AND COMMERCIAL
CAMPGROUNDS.
USDA Forest Service Research Note NE-59.

Campers interviewed at four commercial and four public campgrounds in New England revealed many significant differences in their styles of camping, equipment, mobility, and camping frequency.

LaPage, W. F.

1968. THE ROLE OF CUSTOMER SATISFACTION IN MANAGING COMMERCIAL
CAMPGROUNDS.
USDA Forest Service Research Paper NE-105.

The key to a successful private campground is satisfied customers. And, a satisfied customer is one who finds most of his demands met.

LaPage, W. F.

1968. THE ROLE OF FEES IN CAMPER DECISIONS.
USDA Forest Service Research Paper NE-118.

Size and method of charging fees do influence decisions of when, where, and how much to camp, even at relatively low levels of \$2 and \$4 per campsite per night.

Shafer, Elwood L., Jr., and Roger C. Thompson.

1968. MODELS THAT DESCRIBE USE OF ADIRONDACK CAMPGROUNDS.
Forest Science. 14:4.

In order to describe recreation use mathematically, recreation researchers studied 40 physical site characteristics of 24 Adirondack campgrounds. They were able to isolate nine environmental features as essential ingredients toward use intensity and were able to equate average annual number of camping days with campground size and water-recreation offerings.

Whittaker, J. C., W. A. Wayt, and R. W. Acton.

1968. A LOOK AT COMMERCIAL RECREATION ON SMALL WOODLANDS
IN OHIO.

USDA Forest Service Research Paper NE-101.

A report of five case studies of commercial recreation developments suggests a number of considerations which potential recreation enterprise developers should examine before undertaking such an enterprise on their lands.

LaPage, W. F.

1969. CAMPGROUND MARKETING: THE HEAVY-HALF STRATEGY.
USDA Forest Service Research Note NE-93.

Half of the campers do much more than half of the camping. And campers in the heavy half consistently camp more year after year.

Shafer, Elwood L., Jr.

1969. THE AVERAGE CAMPER WHO DOESN'T EXIST.
USDA Forest Service Research Paper NE-142.

A questionnaire survey of campers at five New York State campgrounds showed that campers vary very much — not only from campground to campground, but also at the same campground from month to month.

LaPage, W. F.

1970. CAMPGROUNDS AND CAMPER MARKET RESEARCH.
Trends in Parks and Recreation 7 (1): 7-12.

Summarizes current camping market research and some of the problems of developing and managing commercial campgrounds.